



INTERNAL REVENUE SERVICE

Revenue Agent

Telephone Assessment Program

*Assessment
Information
for
Candidates*

The Revenue Agent (RA) Telephone Assessment Program is part of the screening process for the RA position at the Internal Revenue Service (IRS). This booklet describes the Telephone Assessment Program and what will be required of you.

We are confident that you will find the Program a challenging and interesting experience.



What is the Telephone Assessment Program?

- The IRS Revenue Agent Telephone Assessment Program is administered by Aon Consulting.

Aon is a Human Resource Consulting firm specializing in the assessment of individuals for selection and development purposes.

The Telephone Assessment Program is made up of a variety of simulated telephone interactions. During the 60 minutes of this Program, you will be in the role of a Revenue Agent and will interact over the telephone with trained assessors who are playing the role of IRS customers. In the role of the Revenue Agent, you will be expected to interact with individuals and resolve problems and challenges regarding tax-related information. The interactions are designed to simulate actual situations and challenges faced by Revenue Agents at the IRS. You will be given all of the information you'll need to successfully respond to the questions and requests of the simulated IRS customers.

You have probably been through many assessments in your lifetime, such as the test for a driver's license. As in a driving test, the Telephone Assessment Program involves having trained professionals, known as assessors, observe and evaluate your skills. The assessors rate the behaviors you display against standards determined to be critical to success as a Revenue Agent at the IRS.

Please keep in mind that, during your participation, a wide range of behaviors will be exhibited and observed. No single behavior is going to determine your success on the Program.



How was the Telephone Assessment Program developed?

Assessment specialists interviewed actual Revenue Agents and their managers to learn about typical challenges faced by Revenue Agents, and noted how skilled Revenue Agents handled various issues and offered information and solutions. The standards against which candidates are evaluated were set by Subject Matter Experts at the IRS and are used by Aon assessors when evaluating each candidate's skills.

What comprises the Assessment Program?

● The Telephone Assessment Program was designed to be a simplified version of the Revenue Agent job at the IRS. It is a two-part process: the first part involves reviewing materials and preparing for the telephone calls, and the second is talking with individuals on the telephone. At the start of the Program, you will be given materials to read that provide you with both the procedures to be followed and the background information and support materials you will use during the Program. **The procedures and tax information described in the background materials are similar, but not identical, to those used by the IRS.** For this Program, you will follow the procedures **only as they are described** in the Candidate's Materials. You will use the first 30 minutes of the 60-minute Program to prepare before you conduct any calls.

After you have prepared for 30 minutes, you will conduct your first call. The first call will be a practice call that will not be rated in order to give you a chance to get use to the materials. After the practice call, you will conduct three calls with simulated IRS customers or personnel. After the three calls, the evaluation will be complete and you will return all materials to the Test Administrator.

In order to participate in the Program, you must be able to read and understand written information, as well as communicate with others over the telephone. If you need some assistance with these activities or requirements, tell the Test Administrator before beginning the Program.

What skills will be expected of you during the Telephone Assessment Program?

During the simulated telephone calls, you will be expected to:

- Deal in an understanding and helpful manner with different people
- Convey empathy for others' situations
- Express yourself clearly and precisely
- Draw on available resources to provide detailed and accurate information
- Gather information from customers in order to understand and resolve their issues
- Follow the procedures that are included in the audit process, and
- Work quickly, without sacrificing accuracy and thoroughness.

What can you do to prepare for your participation in the Telephone Assessment Program?

Because this assessment is not a test of knowledge, there is no need for you to study or practice in order to prepare. In addition, remember that **you will not be assessed on your knowledge of actual procedures or tax issues, as they exist at the IRS.** However, there are some general test-taking tips that may help you to do your best on the Program:

Know when and where you are expected to arrive. Make sure you know where to go. Plan to arrive a few minutes before your scheduled time.

Try to relax. It is natural to feel anxious. Relax and be yourself.

What can you do to perform your best in the Assessment Program?

There are a few things to keep in mind to help you perform your best during the Program:

1. *Keep track of time.* The Program is timed. Make sure you use your 30 minutes of preparation time to review all the materials. And, while you want to move through your calls efficiently, at the same time, don't rush through the calls.

2. *Organize the background materials.* Everything you need to handle the calls is included in the envelope given to you. You do not have to memorize the information; you can refer to it as needed. Do not deviate from the information described in these materials.
 3. *Play the role of the Revenue Agent as described in the Candidate's Materials and stay in this role.* Keep in mind that just as you are in role, assessors will be in role and stay in role. As a result, you will not be able to ask the assessors questions about how you are to proceed or what you should be doing. If you have any questions or require assistance, please see your Test Administrator.
 4. *Be yourself.* Do not try to figure out what the IRS wants you to do or what the "correct" answer is. Remember that a wide-range of behaviors are being observed and evaluated.
- We hope this information helps you feel more comfortable about the Telephone Assessment Program and we look forward to your participation.